

WHAT IS CLAIMED IS:

1. A method for managing a deal process, said method comprising the steps of:

prompting a user to create a business profile;

prompting a user to create a deal, including identifying deal team members; and

notifying members of the deal team of tasks to be performed and milestones.

2. A method according to Claim 1 wherein said step of prompting a user to create a business profile further comprises the step of prompting a user to establish user accounts with authority levels of at least one of user, manager, and administrator.

3. A method according to Claim 2 wherein said step of prompting a user to create a business profile further comprises the step of prompting an administrator to set up a structure of divisions and sub-divisions for the business.

4. A method according to Claim 1 wherein said step of prompting a user to create a deal further comprises the step of prompting a user through one of a personal portal or a personalized web page.

5. A method according to Claim 4 wherein said personalized web pages further comprise at least one of an originator page, a prospect page, an intermediary page and a customer page.

6. A method according to Claim 4 wherein said step of prompting a user through a personal portal further comprises the step of prompting a user to create at least one of a work group, a my profile and a user profile.

7. A method according to Claim 1 wherein said step of prompting a user to create a deal further comprises the step of prompting a user to create at least

one of a deal summary, a deal timeline, a deal menu, a deal workspace, a deal discussions area, a deal library and a deal profile.

8. A method according to Claim 7 further comprising the step of creating a briefing page, including channels for both company users and non-company users.

9. A method according to Claim 1 wherein said step of prompting a user to create a deal further comprises the step of building a library for the deal.

10. A method according to Claim 1 wherein said step of notifying members of a deal team further comprises the step of providing a deal status to deal team members.

11. A method according to Claim 1 wherein said step of notifying members of a deal team further comprises the step of prompting a user for feedback.

12. A method according to Claim 1 wherein said step of notifying members of a deal team further comprises the step of providing capability for at least one of a search of profiles of deal team members, a search across all businesses and a deal search, search results in a format specified by the user.

13. A method according to Claim 1 wherein said step of notifying members of a deal team further comprises the step of prompting a user to create or modify at least one of task templates for the deal and library templates for the deal.

14. A method according to Claim 1 wherein said step of prompting a user to create a deal further comprises the step of prompting a user to create a customer company profile.

15. A method according to Claim 14 wherein said step of prompting a user to create or modify library templates further comprises the step of prompting a user to create or modify an index card functionality used to track information on files uploaded and downloaded from the library.

16. A system comprising:

at least one computer configured as a server, said server containing a database of business rules, libraries and templates for deals for at least one business entity;

at least one client system connected to said server through a network, said server configured to:

prompt a user to create a deal, including identifying deal team members; and

notify members of the deal team of tasks to perform and milestones accomplished.

17. A system according to Claim 16 wherein said server is configured with user accounts with authority levels of at least one of user, manager, and administrator.

18. A system according to Claim 16 wherein said server is configured with a business structure of divisions and sub-divisions for the business.

19. A system according to Claim 16 wherein said server is configured to prompt a user to create a deal through one of a personal portal or a personalized web page.

20. A system according to Claim 19 wherein said server is configured with personalized web pages of at least one of a deal originator page, a prospect page, an intermediary page and a customer page.

21. A system according to Claim 19 wherein said personal portal comprises an interface to at least one of a work group, a my profile and a user profile.

22. A system according to Claim 16 wherein said server is configured with at least one of a deal summary, a deal timeline, a deal menu, a deal workspace, a deal discussions area, a deal library and a deal profile.

23. A system according to Claim 16 wherein said server is configured with a briefing page, including channels for both company users and non-company users.

24. A system according to Claim 16 wherein said server is configured to assign tasks for members of the deal team.

25. A system according to Claim 16 wherein said server is configured to provide deal team members with a deal status.

26. A system according to Claim 16 wherein said server is configured to prompt a user for feedback.

27. A system according to Claim 16 wherein said server is configured with a search capability for at least one of searching profiles of deal team members, searching across all businesses within a multiple business company, and deal searching.

28. A system according to Claim 27 wherein said server is configured to provide search results in a format specified by a user.

29. A system according to Claim 16 wherein said server is configured for at least one of prompting a user to create and modify task templates including milestones and tasks for the deal and prompting a user to create and modify library templates for the deal.

30. A system according to Claim 16 wherein said server comprises an index card functionality for tracking information on files uploaded and downloaded from a library.

31. Apparatus comprising:

means for a user to create business profiles;

means for storing records of identified business prospects;

means for creating user interfaces for business prospects;

means for storing a status for the business prospects; and

means to facilitate deal processing and tracking by members of a deal team.

32. Apparatus according to Claim 31 wherein said means for a user to create business profiles comprises means to set up and maintain user accounts with authority levels of at least one of user, manager, and administrator.

33. Apparatus according to Claim 31 wherein said means for a user to create business profiles comprises means to maintain a structure for the business, including creation and modification of divisions and sub-divisions for the business.

34. Apparatus according to Claim 31 further comprising means for creating at least one of user accounts through a personal portal or personalized web pages.

35. Apparatus according to Claim 31 further comprising means for creating and storing at least one of a deal originator page, a prospect page and a customer page.

36. Apparatus according to Claim 31 further comprising means for creating and storing at least one of a work group, a my profile, a user profile and a customer company profile.

37. Apparatus according to Claim 31 further comprising means for creating and storing a deal, including least one of a deal summary, a deal workgroup, a deal timeline, a deal menu, a deal workspace, a deal discussions area, a deal library, a deal profile, a deal status and a briefing page.

38. Apparatus according to Claim 37 further comprising means for creating and storing milestones and tasks for members of a deal team.

39. Apparatus according to Claim 37 further comprising means for creating and storing user feedback.

40. Apparatus according to Claim 37 further comprising means for searching profiles of deal team members and searching across all businesses within a multiple business company.

41. Apparatus according to Claim 37 further comprising means for searching within the deal and providing search results in a format specified by the user.

42. Apparatus according to Claim 37 further comprising means for at least one of creating and modifying and task templates for a deal, creating and modifying library templates for a deal and creating and modifying an index card functionality for tracking information on files uploaded and downloaded from a library.

43. A database comprising:

at least one business profile; and

a plurality of templates for creating library folder structures for association with a deal.

44. A database according to Claim 43 further comprising a plurality of task templates for associating milestones and tasks with a deal.

45. A database according to Claim 43 wherein said business profile includes at least one division profile for divisions of the business.

46. A database according to Claim 45 wherein said division profile includes at least one sub-division profile for a sub-division of the division.

47. A database according to Claim 43 further comprising a plurality of at least one of user profiles and customer company profiles.

48. A method for initiating a deal transaction, said method comprising the steps of:

accessing a user interface;

selecting, from the user interface, the initiation of a deal; and

selecting, from the user interface, members of a deal team.

49. A method according to Claim 48 wherein said user interface comprises at least one of a personalized user portal and a prospecting web page.

50. A method according to Claim 48 wherein said step of selecting deal initiation further comprises the step of causing a deal to be created.

51. A method according to Claim 50 wherein said step of causing a deal to be created further comprises the step of selecting at least one of a library template and a task template, including milestones and tasks, for the deal.

52. A method according to Claim 50 wherein said step of causing a deal to be created further comprises the step of causing a deal discussion area to be created.

53. A method according to Claim 49 wherein said prospecting web page comprises one of an originator page, a prospect page, an intermediary page and a customer page.

54. A method according to Claim 48 wherein said step of selecting, members of a deal team further comprises the step of causing a user profile pop-up window to be displayed.

55. A computer-readable medium comprising:
a record of business profiles for a company; and

a plurality of records of library templates and task templates for deal creation;

at least one record of an active deal.

56. A computer-readable medium according to Claim 55 wherein said records of library templates comprise library folder structures for association with a deal.

57. A computer-readable medium according to Claim 55 wherein said records of task templates comprise milestones, tasks and sub-tasks for association with a deal.

58. A computer-readable medium according to Claim 55 wherein said records of business profiles include division profiles and sub-division profiles for the business.

59. A computer-readable medium according to Claim 55 further comprising a plurality of user profiles and company profiles.

60. A computer-readable medium according to Claim 55 wherein said record of an active deal includes a deal summary.

61. A computer-readable medium comprising:

a record of user interfaces;

a record of user initiated deals; and

a record of deal team members for each deal.

62. A computer-readable medium according to Claim 61 wherein said record of user interfaces comprises a record of one of a personalized user portal or a prospecting web page.

63. A computer-readable medium according to Claim 61 wherein said record of user initiated deals comprises a selection of at least one of a library template and a task template, including milestones and tasks, for the deal.

64. A computer-readable medium according to Claim 61 wherein said record of user initiated deals comprises a record for a deal discussion area for the deal.

65. A computer-readable medium according to Claim 62 wherein said record of a prospecting web page comprises a record of at least one of an originator page, a prospect page, an intermediary page and a customer page.

66. A computer-readable medium according to Claim 61 wherein record of deal team members further comprises a record of user profiles.

67. A computer programmed to prompt a user with a deal prospect web page.

68. A computer according to Claim 67 wherein to prompt a user with a prospect web page, said computer displays a computer generated screen of at least one of an originator page, a prospect page, a customer page and an intermediary page.

69. A computer according to Claim 67 wherein to prompt a user with a prospect web page, said computer displays a computer generated screen including a selectable link to at least one of a message center, a company tools and tours screen, a case studies screen, a spotlight feature screen and a resources screen.

70. A computer according to Claim 67 programmed to generate a home page activity report page indicating which users at which companies are accessing the prospect web pages, how often the page is accessed, and which tools are being accessed.

71. A computer programmed to prompt a prospect with a customer invitation screen, wherein to prompt the prospect with the customer invitation screen prompts the prospect to register as a user.

72. A computer according to Claim 71 wherein to register as a user, said computer displays fields for the prospect to enter at least one of a username and a password, providing a portal for future access.

73. A computer according to Claim 71 wherein to register as a user, said computer displays fields for the prospect to enter at least one of a company name, an industry template and user data.

74. A computer according to Claim 71 further programmed to display to registered users personalized news feeds, templates, contacts and tasks.